

A scenic photograph of a fly fisherman in a river. The fisherman is in the background, slightly out of focus, wearing a cap and waders, holding a fishing rod. The foreground shows a close-up of a fly fishing lure with blue and orange feathers, just above the water's surface. The water is clear and greenish, reflecting the surrounding forest. The background features a dense evergreen forest and distant mountains under a clear blue sky.

# GOVERNOR'S TASK FORCE ON THE OUTDOORS ECONOMIC IMPACT

TRAVEL



OREGON

STEPHEN HATFIELD  
Outdoor Recreation Manager  
8.27.2019



## TRAVEL OREGON

Travel Oregon, is a semi-independent agency created by the Oregon Legislature in 2003 to enhance Oregonians' quality of life by strengthening economic impacts of the state's \$12.3 billion tourism industry with over 115,400 jobs.



## OUR VISION

A better life for all Oregonians through strong, sustainable local economies.

## OUR MISSION

We inspire travel that drives community and economic development. Through innovation and partnerships, we share the stories of Oregon's people and places, deliver world-class experiences, strengthen the industry, ensure preservation of Oregon's way of life and its natural places and work to ensure all travelers feel welcome.

# WHY TOURISM MATTERS IN OREGON

In 2018, Oregon tourism:

- Generated \$12.3 billion in direct travel spending
- Generated 115,400 jobs in Oregon & indirectly creates another 60,000 jobs
- Produced \$560 million in state and local tax revenue
- Was one of the three largest export-oriented industries in rural Oregon (\$5.5 billion)

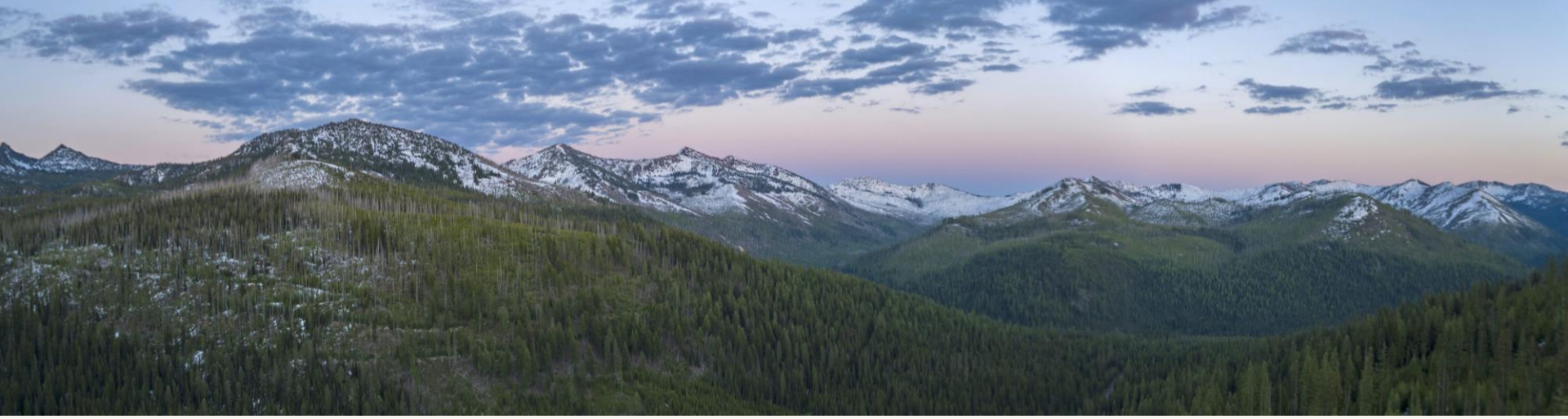
Oregon Travel Impacts 1991–2018, Dean Runyan Associates  
Available at: [Industry.TravelOregon.com](https://Industry.TravelOregon.com)





# TOTAL ECONOMIC IMPACT OF TOURISM IN OREGON

	IN 2003	IN 2018	CHANGE
<i>Direct Employment</i>	84,500 jobs	115,400 jobs	+37%
<i>Employee Earnings</i>	\$1.7 billion	\$3.6 billion	+112%
<i>Visitor Spending</i>	\$6.5 billion	\$12.3 billion	+89%
<i>Taxes (State/Local)</i>	\$246 million	\$560 million	+128%



## **OREGON NATURAL BEAUTY & OUTDOOR RECREATION**

"What U.S. residents rate Oregon highest for – natural beauty and access to outdoor recreation – are among the top things Oregonians value about living in the state"

Adam Davis, DHM Research

# OUTDOOR RECREATION TOURISM ECONOMY IN OREGON

- Out-of-state visitors to Oregon spend \$5.87 billion on outdoor recreation\*
- 37% of day and overnight visitors participate in outdoor recreation when traveling to or in Oregon
- 23% of overnight marketable trips included the outdoors\*\*
- 70% of Travel Oregon website visitors cite outdoor recreation as an important factor in their decision to visit Oregon

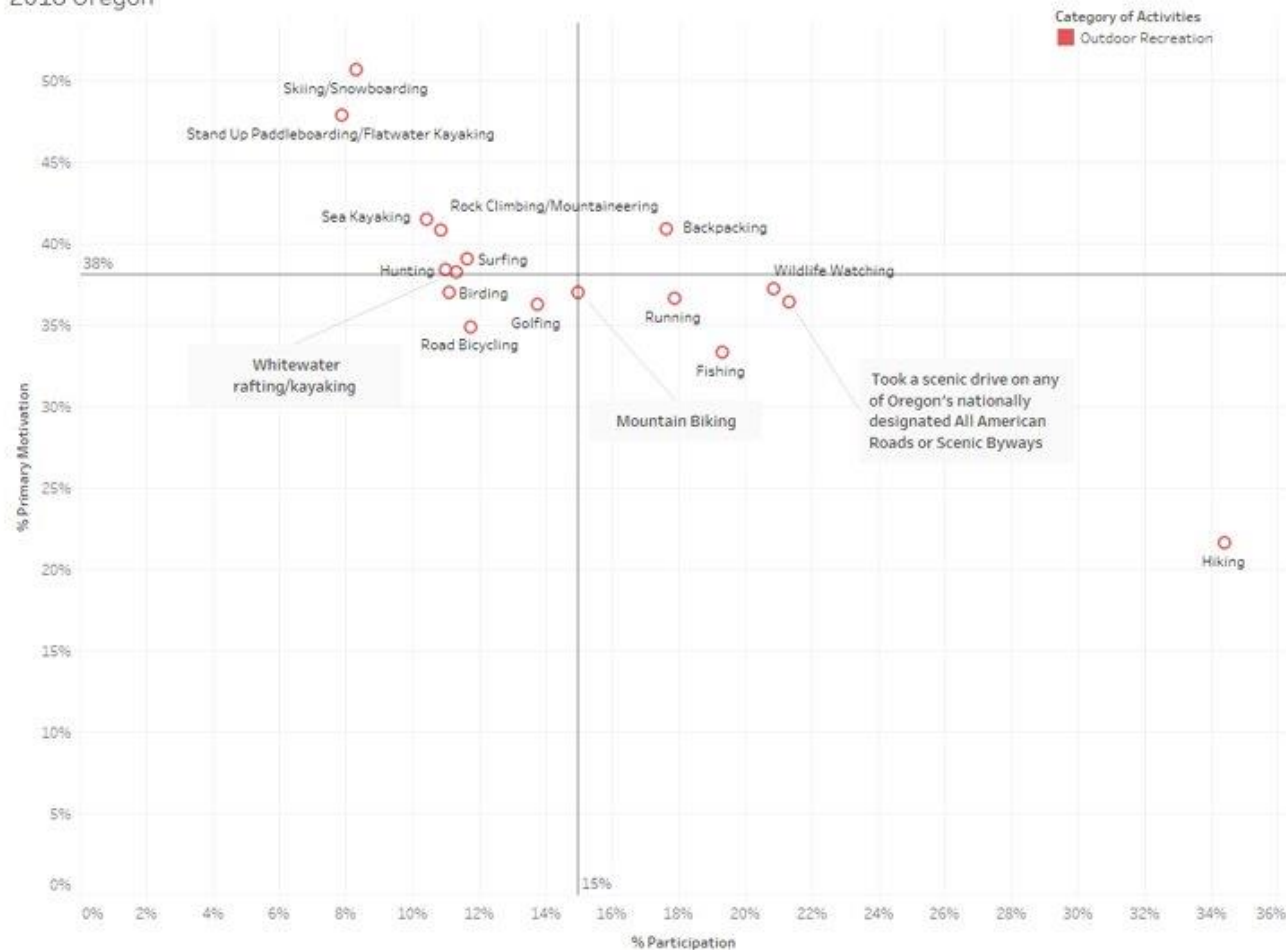
Sources:

\*Outdoor Industry Association, 2017;

\*\* Longwood International, OR Visitor Report



## 2018 Oregon





# DESTINATION DEVELOPMENT

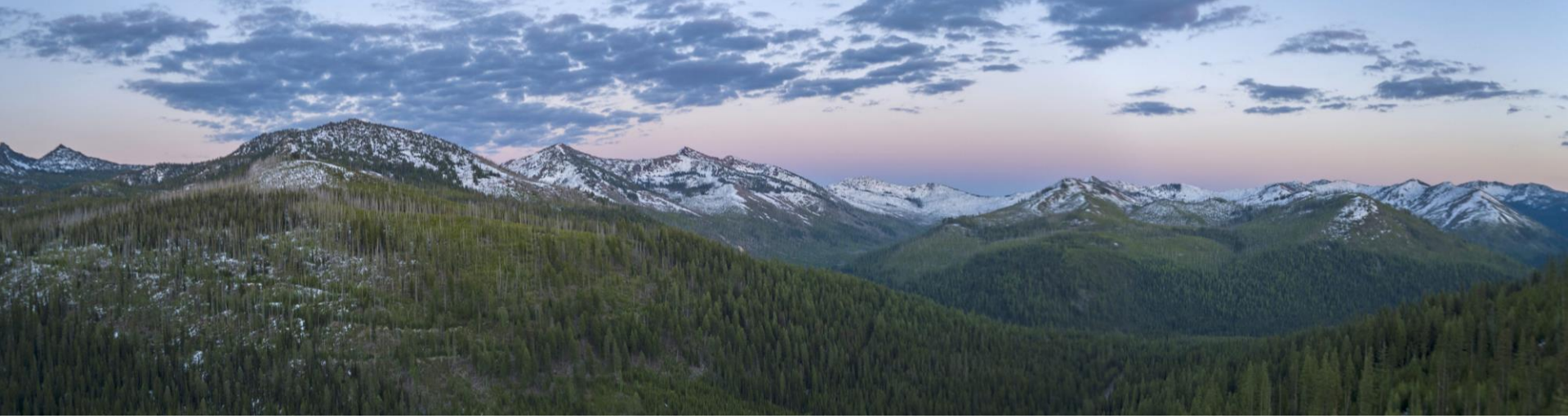
**TRAVEL**



**OREGON**

# TRAVEL OREGON DEPARTMENTS





## DESTINATION DEVELOPMENT

Travel Oregon's Destination Development Team assists communities in creating robust and sustainable tourism economies by developing authentic, world-class experiences for travelers that aim to preserve, enhance and celebrate the local landscape and culture.

# OUR APPROACH

## COMMUNITY-BASED DEVELOPMENT

- Regional economic visioning
- Network development
- Experience-focused action team development

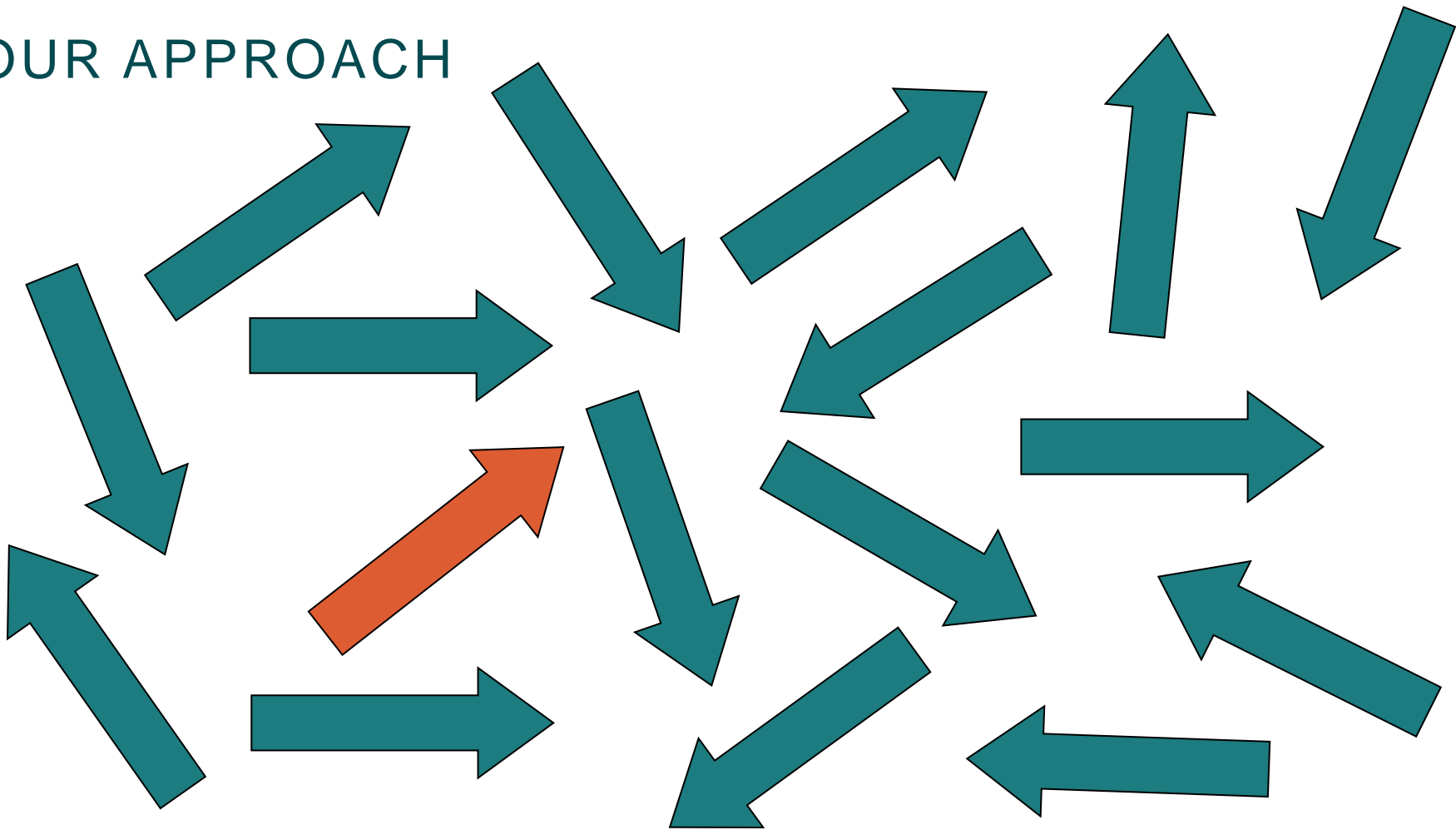
## STATEWIDE PRODUCT DEVELOPMENT

- Outdoor recreation
- Culinary & agritourism
- Visitor transportation

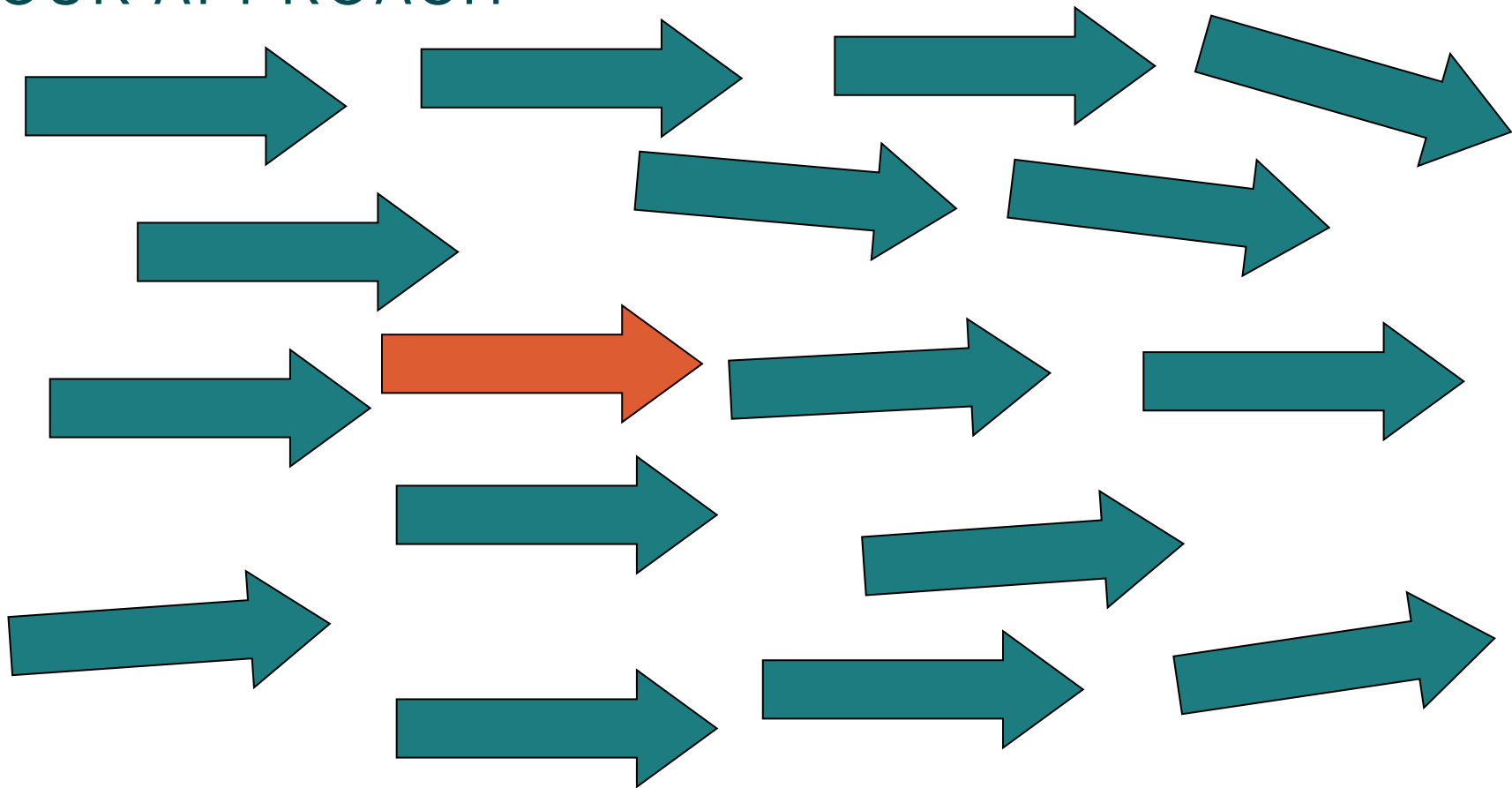




OUR APPROACH



## OUR APPROACH



# OREGON TOURISM STUDIO



# OREGON TOURISM STUDIO

## PROGRAM GOALS

- Raise the awareness and understanding of the value of the tourism industry
- Engage a broad cross-section of the community in a dialogue to identify strengths and opportunities
- Spark creativity and enthusiasm in community leaders to contribute to making Oregon a premiere tourism destination
- Connect community and business leaders with resources to help develop new authentic tourism products and leverage existing assets
- Develop new experiences and products for locals and visitors that sustain or enhance the geographical character of a place



# OREGON TOURISM STUDIO TYPES

RURAL TOURISM  
STUDIO

DESTINATION MANAGEMENT  
STUDIO

EXPERIENCE DEVELOPMENT  
STUDIO



# EXPERIENCE DEVELOPMENT STUDIO

## DEVELOPING NEW VISITOR EXPERIENCES

### CHOOSE FROM

- Outdoor Recreation & Adventure Travel
- Bicycle Tourism
- River Recreation
- Culinary & Agritourism
- Cultural Heritage

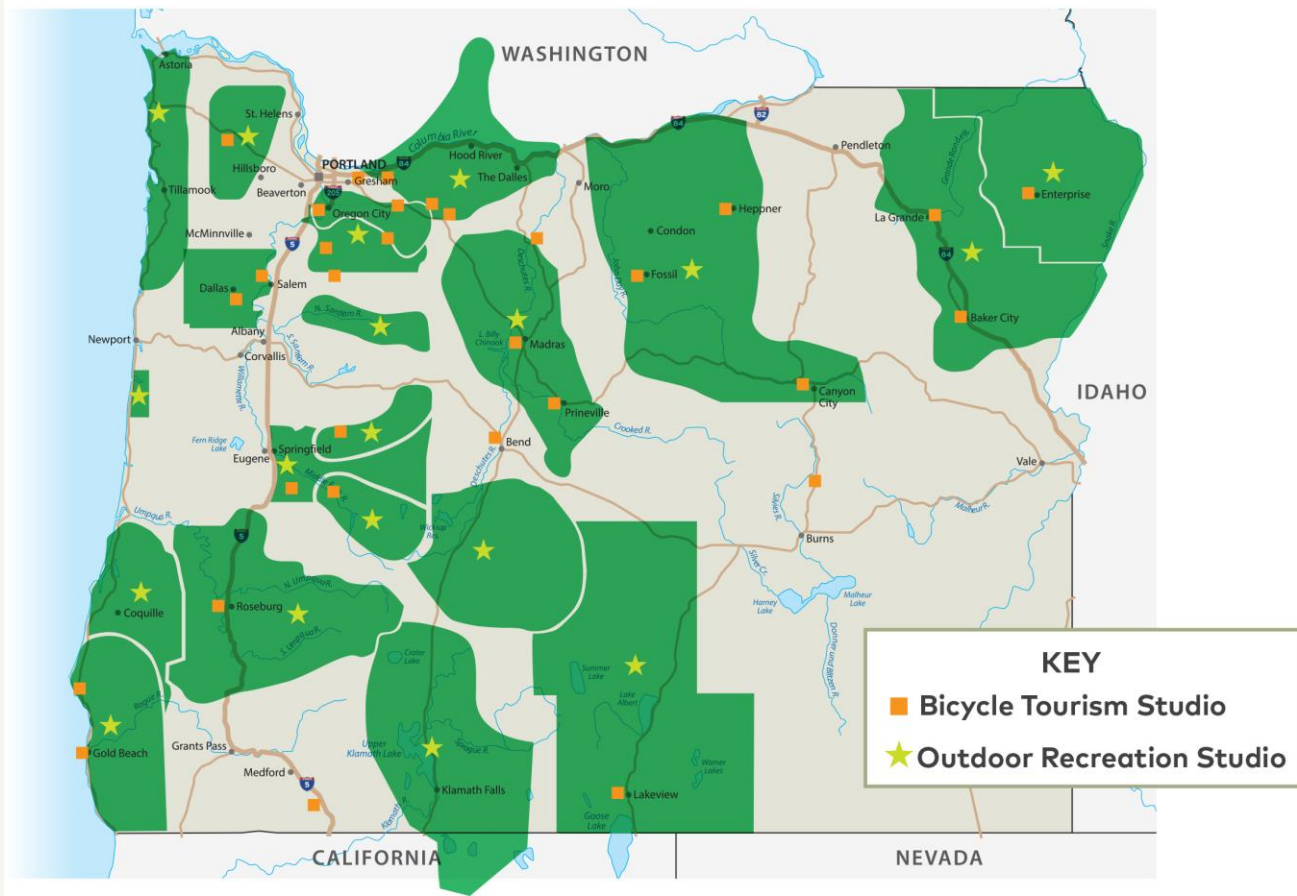
### HIGHLIGHTS

- Travel Oregon brings in a facilitator and content expert(s)
- Priority strategies identified
- Community proponent builds a local action team
- \$5,000 for priority projects

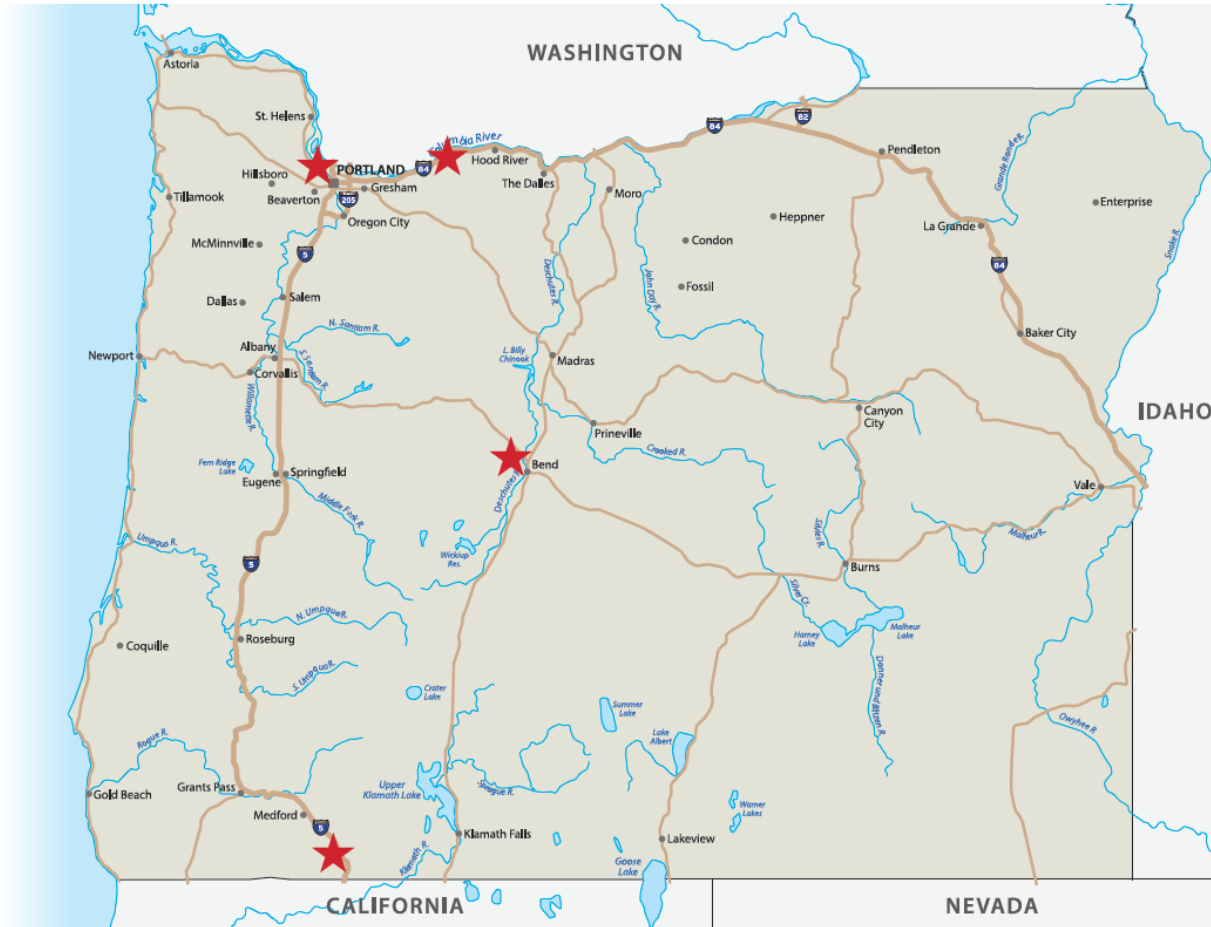


# Oregon Tourism Studio Delivery Areas (2009 - 2019)

## Outdoor Recreation and Bicycle Tourism



# Tour Operators, Guides and Outfitters Trainings





# LESSONS LEARNED

TRAVEL



OREGON

## LESSONS LEARNED

- Communities around the state prioritizing outdoor recreation are facing similar challenges
- Businesses in the outdoor recreation sector encountering similar barriers
- Significant work happening in outdoor recreation sector, but often without consistent coordination and collaboration
- Need for a coordinated effort to support local outdoor recreation development



# OREGON OUTDOOR RECREATION NETWORK

**TRAVEL**



**OREGON**

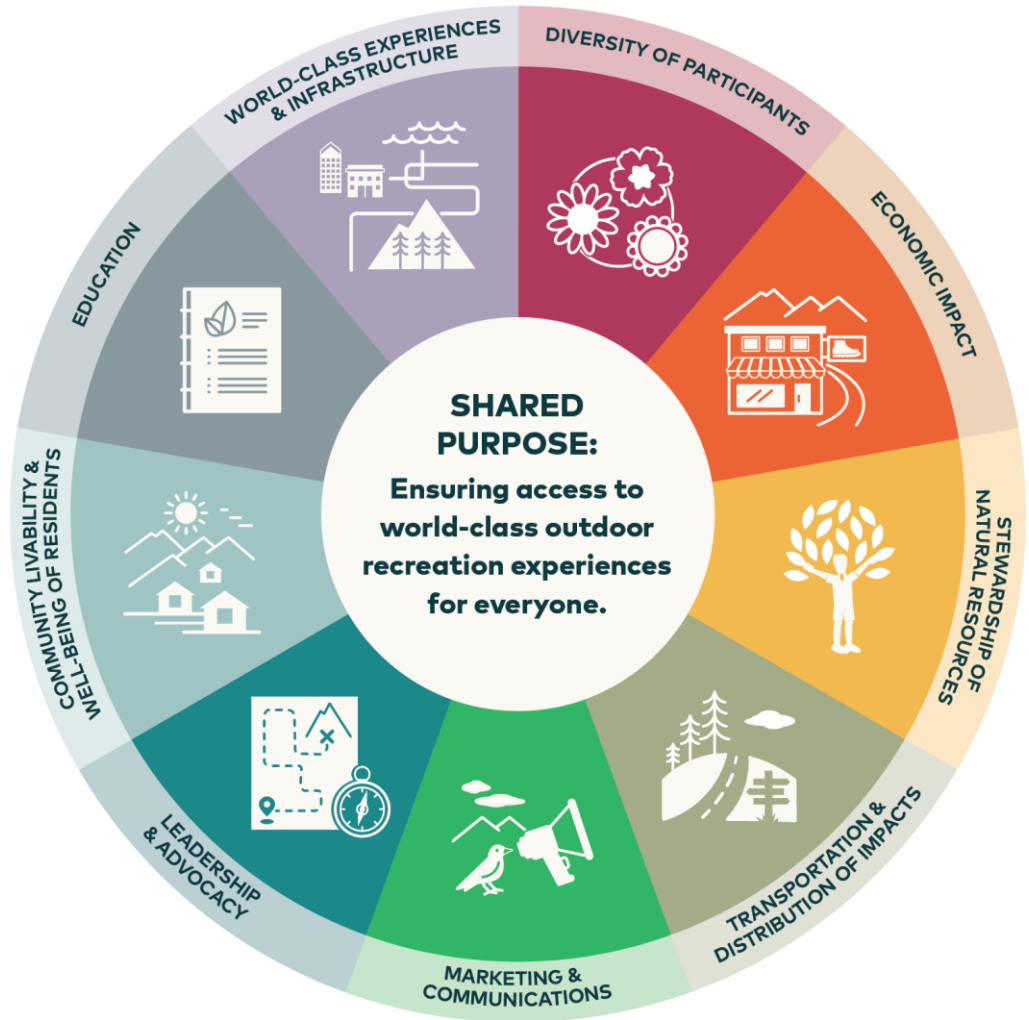
# **OREGON OUTDOOR RECREATION NETWORK**



**To ensure access to world-class outdoor recreation experiences for everyone.**

# OREGON OUTDOOR RECREATION INITIATIVE IMPACT AREAS

- Education
- World-class experiences & infrastructure
- Diversity of participants
- Economic impact
- Stewardship of natural resources
- Transportation & distribution of impacts
- Marketing & communications
- Leadership & advocacy
- Community livability & well-being of residents





## PHASE TWO

### 2017-2019

#### ACTION TEAMS

1. Economic Impact
2. Marketing + communications
3. Network design + development
4. Signature trails
5. Transportation
6. Office of Outdoor Recreation
7. Diversity of participants





# OREGON OUTDOOR RECREATION NETWORK IMPACT AREA: ECONOMIC IMPACT

## FIVE-YEAR OUTCOMES



- The economic impact of the outdoor recreation sector in Oregon has been measured
- Communities prioritize outdoor recreation as a viable economic development strategy and actively pursue opportunities
- With reduced barriers, such as those for special use permits and increased protection from liability, small businesses can excel in the outdoor recreation sector
- New world-class outdoor recreation opportunities exist
- More incentives are available to establish outdoor recreation businesses in Oregon, including tax advantages and credits

# OREGON OUTDOOR RECREATION NETWORK IMPACT AREA: ECONOMIC IMPACT

## PRIORITY STRATEGIES



- Conduct a statewide economic impact study of outdoor recreation in Oregon
- Ensure that Travel Oregon's future tourism studios include an adventure travel and outdoor recreation component.
- Address barriers to improve the climate for businesses in the outdoor recreation sector

# OREGON OUTDOOR RECREATION NETWORK IMPACT AREA: ECONOMIC IMPACT

## PRIORITARY STRATEGIES – CURRENT STATUS

1. Statewide economic impact study currently in motion – expected spring 2020.
2. Travel Oregon tourism studios now include the option to include adventure travel and/or outdoor recreation components.
3. Businesses in the outdoor recreation sector are still encountering barriers.



# POLICY RECOMMENDATIONS



# POLICY RECOMMENDATIONS

## STATE LEVEL

- Address barriers to improve opportunities for outdoor recreation businesses
  - Recreational Immunity
  - Special-use permitting
  - Business permitting
- Dedicated funding stream for trails and outdoor recreation infrastructure
- Differential pricing



# OREGON OUTDOOR RECREATION INITIATIVE PRIORITY STRATEGY G



**Address barriers to improve the climate for businesses in the outdoor recreation sector (broadly inclusive of travel and tourism, manufacturing, retail and education).**

**Address barriers to improve the climate for businesses in the outdoor recreation sector (broadly inclusive of travel and tourism, manufacturing, retail and education).**



### **Initiative A**

**Enhance and update Oregon's liability statutes to identify inherent risks of recreation activities and validate the standard use of pre-activity liability releases by recreation providers.**

**Address barriers to improve the climate for businesses in the outdoor recreation sector (broadly inclusive of travel and tourism, manufacturing, retail and education).**



## **Initiative B**

**Improve the special-use permitting processes and federal land managers' ability to provide a higher level of customer service to their constituents.**

**Address barriers to improve the climate for businesses in the outdoor recreation sector (broadly inclusive of travel and tourism, manufacturing, retail and education).**



## **Initiative C**

**Clarify and clearly communicate requirements and business permits needed to operate in this sector in Oregon.**



## DEDICATED FUNDING STREAMS FOR TRAILS AND RECREATIONAL INFRASTRUCTURE

- Increased funding for signature and priority trails
- Support for infrastructure improvements



## POLICY RECOMMENDATIONS FEDERAL LEVEL

- Support Recreation Not Red Tape (RNR) and Simplifying Outdoor Access for Recreation (SOAR) Acts
- Support full and dedicated funding for Land & Water Conservation Fund (LWCF)

# POLICY RECOMMENDATIONS - SUMMARY

## STATE LEVEL

- Address barriers to improve opportunities for outdoor recreation businesses
  - Recreational immunity
  - Special-use permitting
  - Business permitting
- Dedicated funding stream for trails and outdoor recreation infrastructure
- Differential pricing

## FEDERAL LEVEL

- Support Recreation Not Red Tape (RNR) Act which includes:  
Outdoor Access for Recreation (SOAR) Act Simplifying
- Support full and dedicated funding for Land & Water Conservation Fund (LWCF)



Questions?